

## Meeting Checklist for Tenants

Tenant Name: \_\_\_\_\_

Appointment:                      Date \_\_\_\_\_                      Time \_\_\_\_\_

### Bring to meeting:

- ☐ All completed tenant questionnaires
- ☐ Individual Property Inventory and Tenant Summary
- ☐ Copies of the following—
  - ☐ Income Status Worksheet (if applicable)
  - ☐ Community policies, procedures and ordinances
  - ☐ URA Relocation Assistance for Tenants fact sheet

### During meeting:

- ☐ Ensure tenant understands community policies and procedures
- ☐ Confirm information obtained on tenant questionnaire and/or entered on the property inventory—tenant summary and obtain any missing information:

<input type="checkbox"/> Name	<input type="checkbox"/> Address where tenant currently resides
<input type="checkbox"/> Social Security Number	<input type="checkbox"/> Address of damaged residence
<input type="checkbox"/> Name of property owner	<input type="checkbox"/> Number of months and years at the damaged residence.

- ☐ Complete tenant assistance application/worksheet with tenant:
  - ☐ Ensure tenant meets eligibility requirements
  - ☐ Determine amount of assistance to which tenant is entitled

Amount of assistance due: \_\_\_\_\_

## Form III-12, Meeting Checklist for Tenants

- ☐ Answer questions. If you don't know the answer to a question, write it down, promise to follow up and contact the tenant with the answer. Then, do it!

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- ☐ Document meeting in tenant case file. Include this checklist.

Meeting conducted by—

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Meeting attended by—

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_